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Indonesia

RETAIL FOOD SECTOR

Retail Report Update

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Report Highlights:

Post anticipates that the food retail industry in Indonesia will continue to grow and cater to Indonesia's population of 229 million people. Traditional markets, wet markets and independent grocery stores are gradually being replaced by modern outlets. The burgeoning supermarket and hypermarket sectors are opportunities for U.S. food products as these products become more familiar to a wider Indonesian consumer base. U.S. apples, table grapes, dairy products, potato products, and almonds continue to enjoy a prominent position in Indonesia's retail outlets. Further growth and changes in consumer preferences, along with improved refrigeration and storage facilities, will also create additional opportunities for U.S. exporters.

Post:
Jakarta

Executive Summary:

ECONOMIC TRENDS AND OUTLOOK

Indonesia experienced peaceful direct president elections in 2004 and 2009. This political stability significantly stabilized Indonesia's macro-economy and business climate. This stability helped to protect Indonesia's economy during the recent global economic downturn. Economic growth in 2009 is expected to be around 4 percent. In 2010 economic growth is forecasted to be approximately 5 percent. Indonesia's large consumer base is also demonstrating a strong preference to shop in more comfortable shopping environments, which has led to an ever expanding number of malls in major cities throughout Indonesia. Post believes that prospects for the continued expansion of the retail sector throughout Indonesia remain promising. However, a number of persistent market access issues continue to threaten U.S. food industry exports.

The enforcement of the existing, as well as new regulations on food products often lacks transparency and consistency. The lack of infrastructure, including, but not limited to poor port facilities, supply chain management, and cold chain facilities also create a drag on the wider distribution of food products throughout Indonesia. Another major concern for the food retail sector is the product registration (ML) number issue. Currently, all imported, packaged food for retail purpose must receive an ML number.

I. MARKET SUMMARY

Modern Retail Outlet Expansion

The Indonesian retail sector began its rapid expansion in 1999, when a Presidential Decree allowed Carrefour, a French retailer, to increase its outlet numbers in Jakarta. As other foreign and local retailers followed, the Indonesian retail sector grew and consumers benefited from stronger competition between retailers. Modern retail businesses such as hypermarkets, supermarkets, and mini-markets are replacing more traditional retail outlets, including wet markets and independent small grocers. Growth of these retailers includes foreign retail giants such as Carrefour, Giant, Lotte (formerly Makro), and Lion Superindo. Presidential Decree No 111/2007 stated that only supermarkets under 1,200 square

meters and mini-markets under 400 square meters should be owned by domestic investor.

The development of information technology and changing life styles impacts consumers' perception of the value and quality of food products, as well as the way they purchase daily necessities. National modern retail chains generally start in Jakarta, then spread to other Javanese cities, and finally become established in other areas outside of Java. Foreign and national chains compete directly with existing regional modern outlets in these areas.

Specialty stores serving expatriates from the West, Korea, Japan, as well as domestic high-end consumers in major urban areas, have been negatively impacted because of the ML issue.

I. MARKET SUMMARY

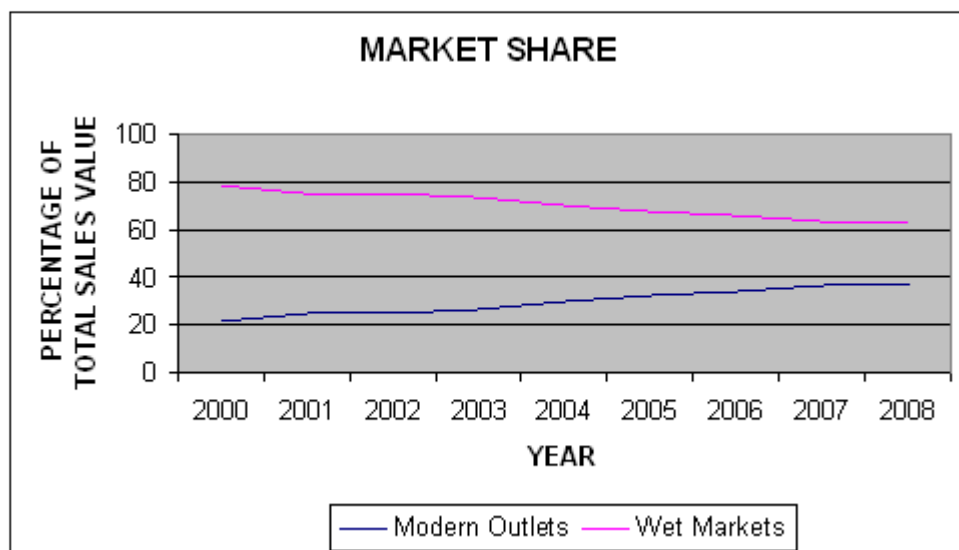
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Figure1. Market Share of Modern Outlets and Traditional Market



Source: AC Nielsen

Note: Modern Outlet: hypermarket, supermarket, mini-market

Traditional market: wet market, independent grocery store

Food Products Offered

Modern retail supermarkets and hypermarkets offer a wide range of food and beverage products and are generally located as anchor stores in shopping centers. An increasing number of Indonesians are shopping at these stores, particularly middle and upper income consumers. In general, grocery products contribute to about 65 percent of these retail sales. These retail stores usually contain in-store bakeries, cafés and restaurants, and prepared meals.

Modern retailers are concentrating on improving their marketing of quality fresh produce, a substantial portion of which is imported, as is exemplified by the emergence of a number of fruit boutiques. There are around 110 fruit boutiques in Jakarta, Cilegon, Tangerang, Depok, Bekasi, Tasikmalaya, Cirebon, Bandung, Semarang, Yogyakarta, Surabaya, Malang, Probolinggo, Denpasar, Makassar, Palembang, and Medan. These stores also sell other imported grocery products. In addition, mini-markets, convenience stores, and other shops carry a range of convenience food items and fresh fruits. These stores are found throughout Indonesia's major urban centers and are also sometimes co-located with petrol stations. Franchising is also driving the rapid growth of mini-markets and convenient stores.

Table1. Sales of Package Food in 2008 (Values in Trillion Rp)

Product	Volume		Value (Trillion Rp)
	Retail	Growth 2007/2008 (%)	Retail
Baby food ('000 ton)	180	13.3	13.6
Bakery products ('000 ton)	1,020	5.9	21.4
Canned/preserved food ('000 ton)	60	11.9	2.2
Chilled processed food ('000 ton)	10	10.8	0.6
Confectionery ('000 ton)	200	8.5	13.4
Dairy products (not countable)	-	-	19.2
Dried processed food ('000 ton)	6,340	10.0	44.5
Frozen processed food ('000 ton)	40	12.5	3.0
Ice cream (million litres)	90	5.0	2.4
Noodles ('000 ton)	1,200	5.9	13.9
Oils and fats ('000 ton)	590	5.2	8.3
Sauces, dressings and condiments ('000 ton)	270	5.0	4.7
Spreads ('000 ton)	10	7.2	0.6
Sweet and savory snacks ('000 ton)	280	5.2	7.9
Meal replacement products, Pasta, Ready meals, Soup ('000 ton)	7	16.9 (Meal rp); 12.3 (Soup); 10.0 (Pasta)	0.4

Source: Euromonitor

In 2008, the average per capita monthly expenditure in Indonesia in 2008 was about 39.60 dollars and 50.17 percent of it goes for food. A typical break down of these expenditures is as follows:

- 11.44 percent for processed food and beverages,
- 9.57 percent for cereals,
- 6.30 percent for fruits and vegetables,
- 3.96 percent for fish and
- 3.12 percent for milk & eggs
- 15.79 percent for other, such as meat & legume, fats and oils

Despite the growth in the modern retail sector, the majority of Indonesians continue to shop at traditional stores conveniently located near their homes or places of work. These stores sell conventional food and beverage products familiar to the majority of consumers.

Halal Products

Indonesian halal concerns continue to challenge U.S. food exporters. According to Indonesian regulations, halal products shall be foods, beverages, drugs, cosmetics, biochemistry products,

genetically modified products composed of halal elements to be consumed, drank, used, or worn that have undertake process of halal products in accordance with Islamic Law.

Recently, the Indonesian Congress, or *Dewan Perwakilan Rakyat* (DPR), began to debate a *Guarantee on Halal Products Law*. Currently Post is unsure when the DPR will pass any definitive laws pertaining to the *Guarantee on Halal Products Law*, but Post expects that a law is forthcoming. Post also believes that this law will mandate that any halal product must be consumed, used, or worn in accordance with Islamic Law. These products must have a recognized halal certificate and be labeled with the recognized halal symbol.

Market Overview

Growth in the number of large modern retail stores is expected to continue, particularly hypermarkets and mini-markets. This growth is being driven mostly by strong shopping preferences. There is ample opportunity for retail store expansion to serve more consumers in Indonesia. In one survey, consumers said they choose a store based on its product pricing and value (13 percent), store accessibility (10 percent), store format and wide selection (10 percent), efficiency and loyalty (9 percent), and products quality (8 percent).

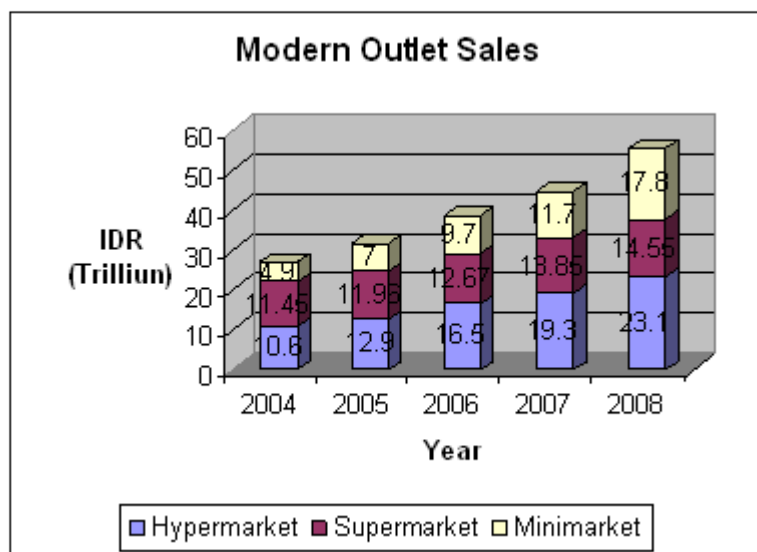
Table2. Number of modern retail outlets

Description	2003	2004	2005	2006	2007	2008
Supermarket	900	960	1,140	1,310	1,380	1,450
Hypermarket	40	70	80	100	120	130
Mini market	4,080	5,600	6,470	7,350	8,890	10,290

Source: AC Nilesen and Economic Review No. 125 March 2009

Foreign retailers drive retail sector growth and the competition between retailers is fierce. Many large retailers are strategically located in the heart of Indonesia's major urban areas and compete directly with smaller retailers. As a result smaller retailers and suppliers have complained to the Indonesian government requesting zoning and trading regulations as well as the protection for small and medium enterprises.

Figure2. Modern Outlet Sales in 2004-2008



Source: Economic Review: No. 215, March 2009

Table3. Grocery Retailers Brand Shares (% value)

Brand	Company	2005	2006	2007	2008
Carrefour	Carrefour Indonesia, PT	1.2	1.4	1.5	1.6
Alfamart (minimarket)	Sumber Alfaria Trijaya, PT	0.4	0.6	0.8	1.0
Indomart (minimarket)	Indomarco Prismaatama, PT	0.5	0.6	0.8	0.9
Giant	Hero Supermarket Tbk, PT	0.5	0.6	0.7	0.8
Hypermart	Matahari Putra Prima Tbk, PT	0.4	0.6	0.7	0.7
Super Indo	Lion Superindo	0.2	0.2	0.3	0.3
Foodmart	Matahari Putra Prima Tbk, PT	-	-	0.1	0.1
Hero	Hero Supermarket Tbk, PT	0.3	0.3	0.2	0.1
Alfa Supermarket	Alfa Retailindo Tbk, PT	0.4	0.4	0.3	-
Matahari Supermarket	Matahari Putra Prima Tbk, PT	0.1	0.1	-	-
Others	Others	95.8	95.2	94.7	94.5

Source: Euromonitor

Imported items continue to face burdensome registration requirements, making business difficult. This is particularly true for specialty stores carrying a high percentage of imported food products or stores that want to test the market for new products. Since September 2008, the National Agency for Drug & Food Control (BPOM) has enforced the ML number regulation for all imported package food for retail purpose. All non-ML products displayed in supermarket shelves and storages are subject to being confiscated. Furthermore, non-transparent and unpredictable customs clearance procedures, besides being costly and administratively cumbersome, create problems when products with limited shelf-life are unexpectedly held at port.

Table4. Distribution of modern outlets all over Indonesia in 2008

Province	Mini-market	Supermarket	Hypermarket	Total
Java	8,775	940	107	9,822
DKI Jakarta	3,968	317	40	4,325
West Java	1,300	194	29	1,523
Banten	1,004	28	14	1,046
Jogjakarta	406	45	4	455
Central Java	979	172	4	1,155
East Java	1,118	184	16	1,318
Sumatera	954	195	11	1,160
North Sumatera	412	74	6	492
Riau & Batam	96	62	2	160
West Sumatera	205	23	-	228
South Sumatera	206	27	3	236
Lampung	35	9	-	44
Bali	200	52	2	254
Sulawesi	104	48	7	159
South Sulawesi	56	37	6	99
North Sulawesi	48	11	1	60
Kalimantan	112	56	3	171
South Kalimantan	40	19	1	60
East Kalimantan	43	23	1	67
West Kalimantan	29	14	1	44
Papua	28	10	-	38
Other	116	146	-	262
Total	10,289	1,447	130	11,866

Source: Economic Review: No. 215, March 2009

Consumer Purchasing Habits

Indonesian consumers tend to follow one of two purchasing habits. The average Indonesian spends 50 percent of his or her income on food. These consumers tend to:

- Shop frequently for food and buy smaller quantities per shopping trip.
- Buy smaller package sizes and place price over packaging quality and appearance.
- Buy local rather than imported products when satisfactory local substitutes are available.
- Commonly buy cooked food at street-side stalls but cook at home is mostly preferred.
- Consume more fresh food items than packaged and processed food.
- Increasingly make decisions based on health and nutrition concerns, prompting processors to provide more fortified food products.
- Increasingly prefer for shopping at supermarket and modern outlets rather than at traditional wet markets due to more comfortable shopping space, more complete range of goods, correct weight, guaranteed quality, food safety and cleanliness, competitive price, good service, and

easier accessibility.

- Make decisions based on advertising.

Expatriate and high-income Indonesian consumers are not as price sensitive and often look for branded, gourmet, and imported items. Organic products are starting to become more popular. Younger consumers from middle and upper income families are also looking for more variety and are less cost conscious.

In response to evolving consumer preferences, distributors and retailers have altered marketing practices. Packaging sizes have been reduced in order to lower prices, and more generic brands, especially for staple foods such as rice, sugar, and cooking oil, have been introduced. Addition, promotional campaigns are becoming more aggressive, with store fliers, seasonal discounts, in-store activities, and advertising more prevalent.

Future Trends

Post expects the patterns of consumer behavior described above are expected to continue. While many consumers are adjusting to paying higher prices for imported and local food products, they remain selective in their product purchases and look for good quality products at low prices. As a result, marketing campaigns for imported products are particularly important, as consumers consider foreign brands to replace more familiar domestic brands. Product value will remain important to consumers, but they will also be looking for greater variety in retailers' assortments.

As incomes grow, opportunities for branded products will continue to strengthen. Interest in the nutritional characteristics of food will also continue to grow. Food safety awareness and consideration will also increase.

Offering additional in-store services will continue to become common. These services include acceptance of credit and debit cards, ATM services, floral departments, laundry services, food courts, bakeries, home delivery services, and cooking services. Money-back or other guarantees, though rare today, are also expected to become more common.

Ready to eat and ready to cook meals are becoming very popular because of the ease of preparation, especially for expatriates living in apartments, middle to upper income consumers, and working mothers.

If Indonesia maintains current food import regulations and enforcement procedures, post expects more local food products in the retails market. Additionally, if the status quo is maintained, there is not

likely to be any significant increases in the production of premium products for the upper end of the market segment, particularly in the short term. The quality, nature, and variety of most locally-produced food products are not comparable to those of the U.S. and other imported products. Local production is largely limited to more Asian types of foods; with utilize different ingredients and production processes.

OPPORTUNITIES FOR U.S. PRODUCTS IN INDONESIA	
1	Large Consumer base: Indonesia has a population of 229 million people, with an estimated 15 percent or about 35 million people in the upper and middle income groups
2	The distribution system is improving, increasing access to the major islands and cities
3	The availability of imported products will be expanded by the rapid growth of the modern supermarket sector and Japanese, Korean, and Western restaurant chains
4	Many Indonesian consumers prefer U.S. product tastes and quality
5	Low Duties: Duties on most food are 5% or less
6	More urban women entering the workforce with less time available for shopping and cooking increasingly focusing on convenience
7	Some multinational companies provide commissary and catering services that demand imported products

CHALLENGES FACING U.S. PRODUCTS IN INDONESIA	
1	Prices of imported products are relatively high compared to locally produced products
2	New-to-market U.S. products are not well-known to the majority of consumers
3	Non-transparent and unpredictable customs clearance procedures
4	Products must have an ML (registration) number. Animal-based food must be certified “halal” and be accompanied by an import permit
5	Product shelf life should be considered for shipments to Indonesia to the extended transportation and inconsistent custom clearance times
6	Infrastructure, including ports and cold storage facilities outside of the main island of Java, are poorly developed
7	Consolidated shipments with products from several suppliers are often most cost effective for Indonesian retailers. This increases documentation problems
8	Third-country competition remains strong, especially from Australia, New Zealand, Europe, Malaysia, the Philippines, Thailand, and China
9	U.S. freight costs are higher relative to competing origins

II. ROAD MAP FOR MARKET ENTRY

Entry Strategy

The best way to enter the Indonesian market is to appoint an agent. In general, the initial volume of

imported product sales is small. An agent is needed to assure the widest distribution for products as well as to undertake the marketing efforts necessary to create awareness for products among consumers.

In some situations, it may make sense to sell product directly to supermarkets or to appoint them as the exclusive distributors. This is particularly recommended for gourmet products, as upscale products are not likely to generate sufficient volume to interest an agent bringing in container loads. Nevertheless, initial sales efforts in Indonesia should include visits with potential agents as well as with key retailers to gain an understanding of the market.

Labeling

Requirements for labeling of food products (primarily applicable to packaged food for retail sale) are broad in scope. Changes resulting from the Food Act of 1996, and the Consumer protection Act of 1999 went into effect in 2000. The newly introduced labeling regulations state that labels must be written in the Indonesian language and note GMO derived ingredients.

All imported processed food products must be registered with BPOM before clearance through Customs. The process for registration of food is complex, often non-transparent, costly, and time consuming due to the detailed requirements regarding supporting documentation that should be carried out before shipping. New regulations require the importers to apply for an import permit on animal based food products, including processed products, from the Director General of Livestock Service, Ministry of Agriculture. This permit must be obtained before an exporter can get an ML or registration number.

Duties and Taxes

Although import duties applied on most of food and agricultural products are 5 percent or less, most imported products are also assessed a value added tax of 10 percent. The Indonesian sales tax is 2.5 percent. Alcoholic beverages are subject to luxury tax that varies between 40-75 percent according to the product category.

Distribution System

Due to the widespread and diverse nature of Indonesia, the distribution system is complex. Indonesian infrastructure is inadequate, especially outside big cities and the island Java. The ability to move frozen and refrigerated products is limited. There are several national distributors, generally subsidiaries of consumer goods and food manufacturers, who serve the whole country and numerous

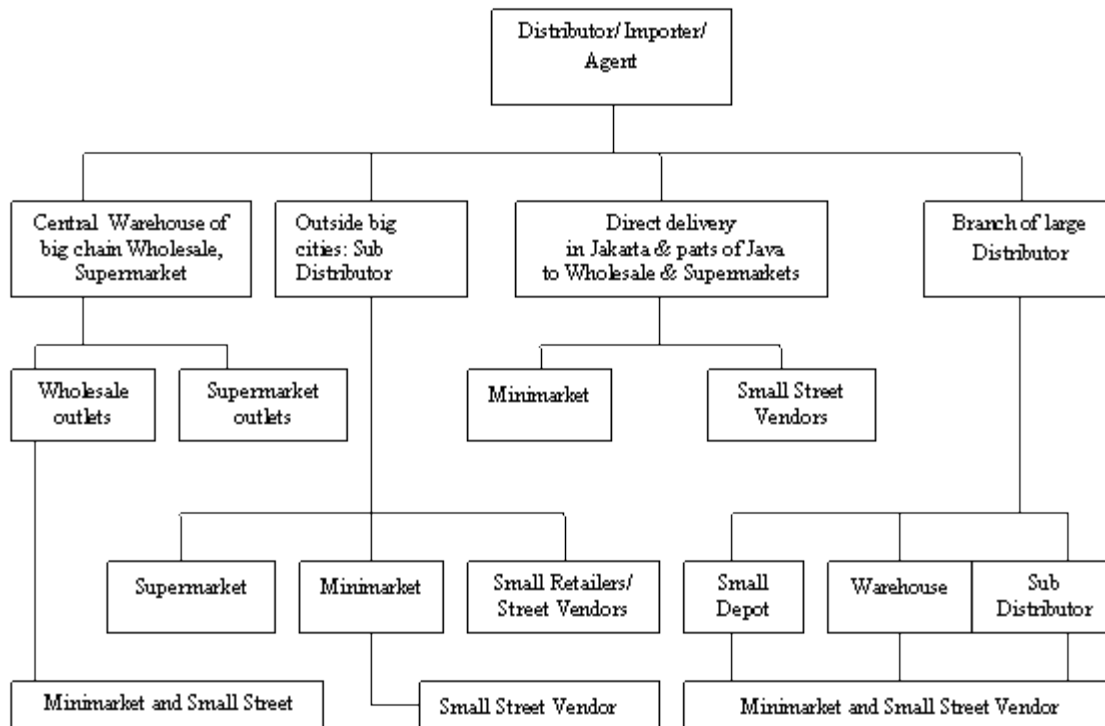
agents and distributors with a more local reach. There are hundreds of wholesalers and millions of retailers.

Inadequate port facilities are often cited as the single largest constraint in the distribution system. Shallow draft that allows only small ships, inadequate loading and unloading facilities, and frequent congestion are some of the problems associated with the ports. Also cited by distribution firms are unreliable shipping schedules and an inadequate number of small ships serving Eastern Indonesia, particularly during bad weather periods. This can result in shortages and lead firms to maintain higher inventories than they desire.

Distribution System for Imported Products

Imported products often move to a distributor or agent, who in turn, sells directly to modern retail outlets. Delivery of the products may be direct to stores or to the warehousing facilities of the retailer. Only a few retailers buy directly from foreign suppliers and assume responsibility for logistics.

Most imported products are sold to the modern retail stores, including hypermarkets, supermarkets, wholesalers, convenience stores, and mini-markets. Products that move to the traditional sector face a more extensive distribution process. There are about 10 major cities that serve as distribution hubs in Indonesia including: Bandung, Yogyakarta, Surabaya, Denpasar, Makassar, Manado, Balikpapan, Banjarmasin, Medan, Pekanbaru, Padang, Palembang, Batam. Generally, products move to warehousing facilities of distributors in these hubs, then to sub-distributors and wholesalers for delivery to retailers.



Trends in Distribution

The modern retail sector is expanding rapidly, but the traditional sector is expected to continue to dominate the distribution system for the foreseeable future. Distribution channels will shorten. Large retailers will increasingly import produce and other products directly from foreign exporters, or will be supplied directly by local manufacturers and fresh produce suppliers or growers. The products are placed in central warehousing and distribution systems in major urban areas utilizing modern technology and equipment. They will open more outlets in cities on Java outside of Jakarta to make these systems efficient. Adequate infrastructure is a major problem on the other islands.

The success of large retailers, wholesalers, and hypermarkets in offering Indonesian consumers a wide variety of products at lower prices will stimulate growth of imported food sales. More middle and low-income consumers are beginning to shop in these outlets. Increasing competition will force existing supermarkets and other modern retailers to focus on targeted consumer groups, to become more sophisticated in their marketing efforts, and to improve efficiency of store operation. The number of mini-markets and other small stores is also predicted to grow. The greatest expansion is anticipated on the islands of Java and Bali, in residential areas and cities outside of Jakarta.

A. Supermarkets, Hypermarkets, and Warehouse Outlets

There are five players in the hypermarket group and three of them dominate the market. In 2008, Carrefour had 48.7 percent of hypermarket sales, followed by Hypermart with 22.1 percent and Giant with 17.8 percent. In addition, there are six supermarkets in the supermarket group that have 76 percent of supermarket sales. They include Hero (plus compact Giant) with 14.61 percent, Carrefour Express with 13.95 percent, Lion Superindo with 13.35 percent, Foodmart with 12.19 percent, Yogya+Griya Supermarket (Yogya group) with 11.62 percent, and Ramayana with 10.61 percent sales.

This segment is the most likely to purchase imported products. Imports can account for anywhere between 5 and 30 percent of the food items sold, increasing to 60 percent for specialty retailers catering to higher end consumers. In the near future, smaller quantities of imported products are expected to be featured, but with a greater variety of brands and items.

Table5. Major Hypermarket, Supermarket, warehouse outlets (Foreign and National Chain)

Retail Name & Market Type	Ownership	Sales/year 2008	No. of outlets in 2008/2009	Locations (city/region)	Purchasing Agent Type
Carrefour	France	N/A	63 hypermarket format and 20 Carrefour Express (supermarket format)	Jakarta, Depok, Bogor, Tangerang, Bekasi, Cikarang, Bandung, Cirebon, Pekalongan, Semarang, Yogyakarta, Solo, Madiun, Surabaya, Malang, Jember, Denpasar, Makassar, Bandar Lampung, Palembang, Medan	Direct, Agent, Importer
Giant	Local & Dairy Farm-Hongkong	N/A	35 hypermarket format and 63 supermarket format	Jakarta, Tangerang, Serang, Banten, Depok, Bogor, Bekasi, Kerawang, Purwakarta, Cimahi, Bandung, Sukabumi, Pekalongan, Yogyakarta, Surabaya, Malang, Sidoarjo, Probolinggo, Pasuruan, Banyuwangi, Bali, Bandar Lampung, Bengkulu, Pakanbaru	Direct, Agent, Importer
Hypermart	Local	Rp. 11,977 billion for all PT Matahari Prima Putra Tbk businesses include Hypermart, Food Mart, Boston HBCs	47	Jakarta, Cilegon, tangerang, Depok, Bogor, Bekasi, Cianjur, Bandung, Pekalongan, Semarang, Solo, Madiun, Surabaya, Malang, Kuta (Bali), Batam, Makassar, Manado, Balikpapan, Banjarmasin, Pontianak, Bandar	Agent, Importer

		(Rp. 5.7 billion)		Lampung, Palembang, Jambi, Pekanbaru, Medan, Binjai (North Sumatera)	
Indogrosir	Local	N/A	3	Jakarta, Yogyakarta, Surabaya	Agent, Importer
Lotte Mart/former Makro	South Korea	N/A	19	Jakarta, Tangerang, Bekasi, Bandung, Semarang, Yogyakarta, Solo, Sidoarjo, Medan, Pekanbaru, Palembang, Bali, Makassar, Banjarmasin, Balikpapan	
Alfa Midi (bigger than mini market but smaller than supermarket)	Local	N/A	102	Jakarta, Bogor, Tangerang, Bekasi, Banten, Serang, Kerawang, Surabaya, Sidoarjo, Gresik	Agent, Importer
D'Best (fomer Diamond supermarket)	Local	N/A	6	Jakarta, Palembang, Makassar, Batam, Yogyakarta	Agent, Importer
Food mart (formerly Matahari Supermarket)	Local	Rp. 11,977 billion for all PT Matahari Prima Putra Tbk businesses include Hypermart, Food Mart, Boston HBCs (Rp. 5.7 billion)	27	Jakarta, Cilegon, Bogor, Kerawang, Cirebon, Pekalongan, Kudus, Klaten, Purwokerto, Magelang, Yogyakarta, Madiun, Malang, Jember, Denpasar, Samarinda, Pontianak, Bandar Lampung, Pekanbaru, Padang	
Gelael	Local	N/A	12	Jakarta, Semarang, Kuta, Makassar Gorontalo, Manado, Timika, Bandar Lampung	Agent, Importer
Hero	Local & Dairy Farm Hongkong	N/A	41	Jakarta, Serang, Bekasi, Bandung, Yogyakarta, Surabaya, Sidoarjo, Malang, Denpasar, Lombok, Timika, Makassar, Balikpapan, Banjarmasin, Samarinda	Agent, Importer
Lion Superindo	Local-Delhaize Belgia	N/A	68	Jakarta, Tangerang, Cilegon, Depok, Cibinong, Bogor, Bekasi, Cikampek, Cimahi, Bandung, Sukabumi, Sumedang, Yogyakarta, Surabaya, Palembang	Agent, Importer
Ramayana	Local	Rp.5,526 billion for all PT Ramayana Lestari Sentosa Tbk business and Ramayana and	93	Jakarta, Cilegon, Serang, Tangerang, Depok, Cibinong, Bogor, Bekasi, Kerawang, Cikarang, Cianjur, Sukabumi, Purwakarta, Cimahi, Cirebon, Semarang, Salatiga,	Agent, Importer

		Orange Supermarket contribute to 29.3% of total sales		Kudus, Surabaya, Sidoarjo, Gresik, Malang, Banyuwangi, Denpasar, Kupang, Tarakan, Banjarmasin, Makassar, Palu, Balikpapan, Pontianak, Bandar Lampung, Palembang, Pangkal Pinang, Jambi, Pakanbaru, Tanjung Pinang, Batam, Padang, Bukittinggi, Medan, Binjai, Tebing Tinggi, Pematang Siantar,	
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Table6. High end Supermarket and Specialty Store

Retail Name & Market Type	Ownership	Sales/year 2008	No. of outlets in 2008/2009	Locations (city/region)	Purchasing Agent Type
Bali Deli	Local	N/A	1	Bali	Agent, Importer
Cosmo Japanese Food Center	Local	N/A	3	Jakarta, Surabaya, Bali	Agent, Importer
Daiso, Japanese	Local	N/A	1	Jakarta	Agent, Importer
Dijon	Local	N/A	1	Bali	Agent, Importer
The Food Hall (former Sogo)	Local	N/A	8	Jakarta, Surabaya	Agent, Importer
Gourmet Garage	Local	N/A	2	Bali, Jakarta	Direct, Agent, Importer
Hanil Mart - Korean	Local	N/A	2	Jakarta, Tangerang	Agent, Importer
Kamome, Japanese	Local	N/A	1	Jakarta	Agent, Importer
Kemchicks	Local	N/A	2	Jakarta	Agent, Importer
Lucky supermarket group (includes Grand Lucky, Brastagi, and fruit boutiques)	Local	N/A	15	Jakarta, Surabaya, Pakanbaru, Medan	Agent, Importer
Mu Gung Hwa, Korean	Local	N/A	4	Jakarta	Agent, Importer
New Seoul Super, Korean	Local	N/A	1	Jakarta	Agent, Importer
Papaya, Japanese	Local	N/A	6	Jakarta, Bandung, Surabaya, Bali	Agent, Importer
Pepito	Local	N/A	1	Bali	Agent, Importer
Ranch Market	Local	N/A	6	Jakarta, Surabaya	Agent, Importer
Setiabudhi	Local	N/A	1	Bandung	Agent, Importer
Wijaya Mart, Korean	Local	N/A	1	Jakarta	Agent, Importer

Table7. Some Regional Supermarket

Retail Name & Market Type	Ownership	Sales/year 2008	No. of outlets in 2008/2009	Locations (city/region)	Purchasing Agent Type

711 Supermarket	Local	N/A	2	Bandung	Agent, Importer
ACB Supermarket	Local	N/A	3	Ciamis, Banjar	Agent, Importer
Ada Supermarket	Local	N/A	5	Semarang, Bogor	Agent, Importer
Aneka Buana Supermarket	Local	N/A	2	Jakarta, Tangerang	Agent, Importer
Aneka Subur Supermarket	Local	N/A	3	Tangerang	Agent, Importer
Asia Supermarket	Local	N/A	2	Cirebon, Garut	Agent, Importer
Ayunadi Supermarket	Local	N/A	3	Tuban, Denpasar	Agent, Importer
Baji Pamae Supermarket	Local	N/A	1	Makassar	Agent, Importer
BM Mart	Local	N/A	1	Manado	Agent, Importer
Bintang Supermarket	Local	N/A	2	Kuta, Ubud	Agent, Importer
Bonnet Supermarket	Local	N/A	1	Surabaya	Agent, Importer
Borma	Local	N/A	15	Bandung, Cimahi	Agent, Importer
Bromo Supermarket	Local	N/A	1	Manado	Agent, Importer
Cahaya Supermarket	Local	N/A	1	Jakarta	Agent, Importer
Casa Supermarket	Local	N/A	1	Surabaya	Agent, Importer
Chandra	Local	N/A	6	Bandar Lampung	Agent, Importer
Coco Supermarket	Local	N/A	1	Manado	Agent, Importer
Daily Market	Local	N/A	1	Denpasar	Agent, Importer
Dedy Jaya Supermarket	Local	N/A	4	Tegal, Brebes	Agent, Importer
Delta Supermarket	Local	N/A	1	Ubud	Agent, Importer
Dieng Supermarket	Local	N/A	4	Purwokert, Banjarnegara, Banyumas	Agent, Importer
Family Supermaket	Local	N/A	1	Manado	Agent, Importer
Fiesta Supermarket	Local	N/A	2	Manado	Agent, Importer
Fortune Swalayan	Local	N/A	1	Bogor	Agent, Importer
Freshmart Supermarket	Local	N/A	1	Manado	Agent, Importer
Gardena Supermarket	Local	N/A	2	Yogyakarta, Magelang	Agent, Importer
Gloria	Local	N/A	1	Jakarta	Agent,

Supermarket					Importer
Gogo Mart	Local	N/A	3	Cianjur, Makassar, Manado	Agent, Importer
Golden Supermarket	Local	N/A	3	Manado, Pamekasan-Madura, Kediri	Agent, Importer
Hardy's	Local	N/A	11	Denpasar	Agent, Importer
Hari hari Swalayan	Local	N/A	7	Jakarta, Bekasi	Agent, Importer
Harmoni Supermarket	Local	N/A	1	Tangerang	Agent, Importer
Hawa Baru	Local	N/A	1	Makassar	Agent, Importer
Indorizki Supermarket	Local	N/A	2	Banyumas, Purbalingga	Agent, Importer
Jumbo Supermarket	Local	N/A	1	Manado	Agent, Importer
Kaisar Supermarket	Local	N/A	1	Pontianak	Agent, Importer
Kamila Supermarket	Local	N/A	1	Surabaya	Agent, Importer
Karya Sari Supermarket	Local	N/A	1	Denpasar	Agent, Importer
Laris Ambarawa	Local	N/A	1	Ambarawa (Central Java)	Agent, Importer
Ligo Mitra Supermarket	Local	N/A	1	Pontianak	Agent, Importer
Luwes Group	Local	N/A	7	Solo, Semarang, Purwodadi, Sragen, Wonogiri, Pati	Agent, Importer
Macan Yaohan	Local	N/A	11	Medan	Agent, Importer
Maju Bersama	Local	N/A	5	Medan	Agent, Importer
Marina Supermarket	Local	N/A	1	Tegal	Agent, Importer
Market City	Local	N/A	1	Jakarta	Agent, Importer
Mawar Supermarket	Local	N/A	1	Bogor	Agent, Importer
Medali Supermarket	Local	N/A	1	Jakarta	Agent, Importer
Metro Supermarket	Local	N/A	3	Pakanbaru, Medan	Agent, Importer
Mini Supermarket	Local	N/A	1	Jakarta	Agent, Importer
Mirota Supermarket	Local	N/A	2	Yogyakarta	Agent, Importer
Mitra Anda Supermarket	Local	N/A	1	Pontianak	Agent, Importer
Mita Mart	Local	N/A	1	Pontianak	Agent, Importer
Mitra Supermarket	Local	N/A	2	Malang	Agent, Importer

Modi Supermarket	Local	N/A	1	Bandung	Agent, Importer
Moro Supermarket	Local	N/A	2	Purwokerto, Pemalang	Agent, Importer
Multimart Supermarket	Local	N/A	1	Manado	Agent, Importer
Naga Supermarket	Local	N/A	9	Jakarta, Bekasi	Agent, Importer
Nsrindo Swalayan	Local	N/A	1	Jakarta	Agent, Importer
Ngesti Swalayan	Local	N/A	1	Bogor	Agent, Importer
Orange Supermarket (Ramayana Group)	Local	See Ramayana	4	Jakarta, Tangerang	Agent, Importer
Pakally Supermarket	Local	N/A	1	Bogor	Agent, Importer
Pasar Raya JM	Local	N/A	4	Palembang	Agent, Importer
Premier Supermarket	Local	N/A	1	Bandung	Agent, Importer
Prisna Toserba	Local	N/A	1	Bogor	Agent, Importer
Progo Supermarket	Local	N/A	1	Yogyakarta	Agent, Importer
Rita Supermarket	Local	N/A	7	Tegal, Purwokerto, Wonosobo, Cilacap, Kebumen	Agent, Importer
Sabar Subur	Local	N/A	4	Tangerang	Agent, Importer
Saga	Local	N/A	3	Timika, Sorong, Jayapura	Agent, Importer
Samudra Supermarket	Local	N/A	2	Tasikmalaya, Manado	Agent, Importer
Santa Supermarket	Local	N/A	1	Jakarta	Agent, Importer
Shangrila Supermarket	Local	N/A	1	Bogor	Agent, Importer
Sri Ratu	Local	N/A	8	Tegal, Pekalongan, Purwokerto, Semarang, Madiun, Kediri	Agent, Importer
Sinar Supermarket	Local	N/A	3	Surabaya	Agent, Importer
Supernova Supermarket	Local	N/A	1	Kuta	Agent, Importer
Surya Laksana Supermarket	Local	N/A	4	Kuningan, Cirebon, Majalengka, Indramayu	Agent, Importer
Suzuya Supermarket	Local	N/A	8	Medan, Pematang Siantar, Binjai, Padang	Agent, Importer
Tiara Dewata Group	Local	N/A	5	Bali	Agent, Importer

Tip Top	Local	N/A	6	Jakarta, Tangerang, Bekasi	Agent, Importer
Tom & Jerry Supermarket	Local	N/A	1	Bangkalan-Madura	Agent, Importer
Toserba Supermarket	Local	N/A	1	Cikarang	Agent, Importer
UFO Supermarket	Local	N/A	3	Surabaya	Agent, Importer
Toserba + Griya Supermarket (Yogya Group)	Local	N/A	57	Jakarta, Pamulang (Tangerang), Bandung, Bogor, Indramayu, Purwakarta, Subang, Sukabumi, Majalaya, Cirebon, Kuningan, Tasik Malaya, Garut, Ciamis	Agent, Importer
Yuki	Local	N/A	3	Medan	Agent, Importer
Yudha Swalayan	Local	N/A	1	Pamulang (Tangerang)	Agent, Importer

B. Mini-markets and Convenience Stores

Mini-markets are rapidly growing in popularity. This is especially true in the cities outside of Jakarta. Indonesian mini-markets are essentially upgraded traditional road side stalls that carry essential staple goods, some frozen items, and fresh fruits. Low prices compared to the major retailers are one of their selling points. Many mini-markets are conveniently located in housing developments and residential areas. Most mini-markets chains have their own distribution facilities. Purchasing from importers or distributors is centralized and items can be delivered to a central warehouse or directly to stores. Imported fruits are available in some of these stores.

In 2008, Indomart and Alfamart were the major stakeholders in this group, with a combined total market share of approximately 84 percent.

Table8. Major Mini-market and Convenience Store

Retail Name & Market Type	Ownership	Sales/year 2008	No. of outlets in 2008/2009	Locations (city/region)	Purchasing Agent Type
Alfa Minimarket (PT Sumber Alfaria Trijaya)	Local	N/A	3,200	Jakarta, Bogor, Bekasi, Java, Bali, Lampung	Agent, Importer
AM/PM (convenience) (PT Sinar Sahabat)	US Franchise	N/A	28	Jakarta	Agent, Importer
Circle K (PT Circleka Indoensia Utama)	US Franchise	N/A	285	Jakarta, Bogor, Batam, Bandung, Bali, Yogyakarta	Agent, Importer
7 Eleven (PT	US Franchise	N/A	5	Bandung	Agent, Importer

Suryamas Cahaya Lestari)					
Indomaret (PT Indomarco Prismata)	Local	N/A	3,800	Jakarta, Bogor, Bekasi, Tangerang, Java, Bali, Lampung, Medan	Agent, Importer
Minimart (PT Sentra Ritelindo)	Local	N/A	39	Bali	Agent, Importer
Star Mart minimarket (PT Hero Supermarket Tbk)	Local	N/A	123	Jakarta	Agent, Importer
Yomart (PT Yomart)	Local	N/A	260	West Java	Agent, Importer

C. Traditional Sector

The traditional sector continues to dominate Indonesian food retailing. This sector includes small stalls, some of which are in traditional markets. Distribution channels are long and complex. Little imported product is carried by these outlets except for fresh fruit and beef offal. Common imported fresh fruit products that found in this market are apples, mandarins, oranges, table grapes and pears. Since a ban on U.S. beef was implemented in 2005, offal is sourced almost exclusively from Australia.

III. COMPETITION

Local companies with a strong position in the food and beverage market

The local industry dominates the markets for baked goods, noodles, and other wheat-based products, snacks, frozen poultry products, processed dairy products, canned fish, soft drinks, and bottled and packaged teas, tropical fruits and vegetables, and fresh sea food.

While businesses featuring fresh produce compete on their ability to supply competitively priced locally grown products, businesses featuring processed food and beverages compete based on brand name. There are several multinational companies in this sector, including Unilever, Nestle, Kraft, Danone, Heinz, Frito Lay, and Effem.

Competition in the import market

Temperate fresh fruit, fruit juice, beef, french fries, confectionary, tree nuts, cheese, and pet foods are mostly imported. Primary competing suppliers include Australia, New Zealand, Netherlands, South

Africa, Canada, Brazil, China, Japan, Korea, Taiwan, Pakistan, Thailand, Malaysia, and Singapore.

Table9. Competition between domestically produced goods and imports in 2008

Product Category	Major Supply Sources (% Volume)	Strengths of Key Supply Countries	Advantages and Disadvantages of Local Suppliers
Other consumer oriented food products (food preparation, non alcoholic beverages other fruit juices, malt extract, baking powder, coffee extract, coffee roasted & decaf, cocoa powder, enzyme, mix dough, yeast, lactose, pasta, prep for cereals, margarine, mix condiment/seasoning) Net volume import: not available Value: \$831 million	(% Value) Malaysia 15% China 12% US 11% Thailand 11% New Zealand 8% Singapore 8% Netherlands 6%	Consumer prefer the taste and lower price of products from China and ASEAN countries Consumer are familiar with products from Netherlands due to the long-term relation US product is well known for its variant	Most of the products are not produced locally or needed as a mixture
Fresh Fruit Net volume import: 470,000 ton Value: \$442 million	China 64% Thailand 15% US 8% Australia 3%	China: fuji apple: yalie per, Shandong pear, red globe table grape, mandarine, orange Thailand: longan, durian US: red delicious and other varieties of apple, table grape and orange Australia: pear, red globe table grape, orange	Only tropical fresh fruit produced locally with inconsistent supply and reliable quantity
Red meats fresh, chilled, frozen Net volume import: 93,000 ton Value: \$202 million	Australia 54% New Zealand 41%	Australia and New Zealand competitive pricing and no reported cases of FMD and BSE	Shortage of supply. Most is sold fresh to traditional markets and modern retail outlets
Fish & Sea food Net volume import: 125,000 ton Value: 119 million	China 25% Malaysia 18% Japan 14% Thailand 12% Pakistan 8% Taiwan 5%	All countries: mackerel and tuna as a raw material for domestic production	High local fish and sea food production. High-end restaurants need non-tropical seafood products
Processed fruits & vegetables Net volume import: 72,000 ton	US 30% China 30% Canada 10%	US: French fries & potato flake, onion & garlic powder, raisin,	

Value: \$89 million	Thailand 6%	and cherry maraschino Canada: frozen processed vegetables (includes French fries) China and Thailand: processed fruit and vegetable, products. Brands are well known and prices are cheaper	
Snack food excl nuts Net volume import: 28,000 ton Value: \$56 million	Malaysia 46% China 34% Singapore 4%	Malaysia, China, and Singapore are able to supply lower price products	Local product is also abundant but consumers are willing to try new products
Cheese Net volume import: 10,600 ton Value: 54.6 million	New Zealand 49% US 30% Australia 13%	Australia and New Zealand cheeses are price competitive	Demand from food industries and bakeries are increasing
Fruit & Vegetable juices Net Volume import: 9,300 ton Value: \$15 million	Australia 18% US 17% South Korea 15% South Africa 7% Thailand 7% Brazil 6% Malaysia 6%	Geographic proximity gives Australia and ASEAN countries advantage due to short product shelf life	Health concerns are prompting Indonesian to choose quality fresh products
Pet foods Net volume import: 13,400 ton Value: \$13 million	Thailand 50% US 33% Australia 11%	Thailand and Australia products sell with competitive price	No pet food is produced locally
Tree nuts Net volume import: 4,300 ton Value: \$6 million	Thailand 40% US 12% Australia 7% China 7%	Thailand supply repack nuts from US	Local tree nut production is limited to the cashew nut

IV. BEST PRODUCT PROSPECTS

Many U.S. food items have strong sales potential in Indonesia. This is especially true of those for which no local substitutes are available. The best opportunities for imported products exist in modern retail outlets in the major cities on Java such as Jakarta, Bandung, Surabaya, Balinese centers of

tourism, and Medan in Sumatera. Potential also exists where foreign companies employ high numbers of expatriates, such as Balikpapan on Kalimantan, Lombok, Sumbawa in Nusa Tenggara Barat, Pekanbaru on Sumatera, and Timika on West Papua.

In most large cities, there is at least one supermarket that caters to the expatriate community providing products unfamiliar in use and taste to typical Indonesians, such as pickles, olives, and condiments. In general, the biggest opportunities exist for good quality, middle or low price ranged items with brand names well-known to expatriates. Because importers purchase in small quantities and transportation costs can be high, products are expensive compared to what expatriates pay at home. However, since 2008, retail stocks of imported products have decreased considerably due to ML registration problem. The Indonesian expatriate community is made of a broader range of ethnicities than in the past, with more expatriates coming to Indonesia from Asian countries.

A. Products Present in the Market which have Good Sales Potential

For U.S. products already present in the Indonesian market, fresh fruit continues to have the best sales prospects. U.S. cheese and processed fruit and vegetables products have also started to increase their market share. Some of the best selling processed foods include frozen french fries, frozen and canned vegetables, breakfast cereals, snack food, biscuits, crackers, popcorn, baby food, dressings, sauces and seasonings, cooking and salad oils, fruit juice and beverages.

Products Present in the Market That Have Good Sales Potential

Best market prospects for imported U.S. food products and competing suppliers' presence, as identified by the FAF/Jakarta based on Indonesian Central Bureau Statistics data are as follows:

Table10. Products Present in the Market That Have Good Sales Potential

Product Category	2008 Import (\$mil)	2008 Import from US (\$mil)	5 Yr. Avg Import (Value) Growth (%)	Import Tariff Rates (%)	Key Constraints to Market Development	Market Attractiveness for USA
Dairy Products excl Cheese	857	171 (mainly non fat dry milk, lactose, whey, butter milk, casein)	31.2	5	Competition from Australia and New Zealand	Demand for dairy processors, food & beverage industries, and bakeries are increasing
Other consumer oriented food	518	51 (mainly food prep., canned food,	15.8	5	Competition from Malaysia, China, Thailand, Netherlands,	Food service and food processors need more and consistent supply

products		mayonnaise, gelatin, starch, pastry, salad dressing)			Singapore, New Zealand, South Korea, France, Brazil, and Germany	of products due to growth of these sectors
Fresh Fruit	426	46 (mainly apples, grapes & orange)	17.2	5 Except mandarin and mango 25%	Competition from China, Thailand, Australia, South Africa, and Argentina.	Health awareness pushes the demand for quality fresh products
Red meats fresh, chilled, frozen	150	0	31.2	5	Competition from Australia, New Zealand, and Canada. Recent regulation only allowed certain US establishments to export beef to Indonesia	High demand of prime beef for high-end restaurants and offal for the lower to mid-class food service industry
Processed fruit & Vegetables	77	29 (mostly onion powder, French fries, potato flakes, sauces, celery, garlic powder)	14.2	5 Except orange juice and pine apple 15%	Competition from China, Canada, Thailand, and Singapore	Increase consumption of fruit juice due to the increase of health awareness
Fish & Seafood	58	5 (mostly crab, crab meat & other seafood)	34	5	Competition from Malaysia, China, Pakistan, Thailand, Japan, Singapore and local products	High-end restaurants need non-tropical seafood products
Cheese	46	5 (fresh cheese, cheddar)	13.4	5	Competition from Australia, New Zealand, France, and Philippines	Demand from food industry, HRI and bakeries are increasing
Snack foods	42	0.5 (mainly confectionary, potato chips, popcorn)	-9.4	5	Competition from China, Malaysia, Switzerland, Thailand, Singapore and local products	Retail industry development pushes sales of snack food products
Pet foods	10	4 (mostly dog & cat food)	21.2	5	Competition from Thailand and Australia	Demand exists for niche market
Tree nuts	6	2.2 (mostly almonds)	34	5	Competition from India, China and local products	Fast-growing bakery industry needs

B. Products Not Present in Substantial Quantities but which have Good Sales Potential

There are also good opportunities for sales of other American high value items. Many of these are not yet in the market in significant quantities. These include refrigerated frozen foods such as frozen pizza, frozen meats, delicatessen meats, organic foods, and specialty fruits, particularly certain types of berries.

C. Products Not Present because They Face Significant Barriers

Prior to the ban on U.S. beef implemented in 2005, the most important U.S. sales item in the retail sector were beef offal marketed in traditional outlets. However since 2008, more and more US meat establishment are approved to export boneless meat to Indonesia although it has not reached the exported volume prior to the ban.

Indonesian imports of U.S. chicken parts, which have high market potential in Indonesia, were banned by the Indonesian government in 2000 due to questions regarding halal certification.

D. Recommendations

Generally, it is a good time to enter the Indonesian market, as the retail sector is growing rapidly. Post believes that the current Indonesian consumer demands a greater variety of products and the market conditions are good building brand awareness. However, it is important to have realistic expectations about the size of the market, as well as some of the ongoing market access challenges. If exporters are flexible and willing to make a long-term commitment to market development, Indonesia has huge potential.

Other recommendations for selling to Indonesia are:

- It is essential to invest in product promotion, especially for new products, to create awareness. Samples are particularly effective in this market.
- Competent Indonesian distributors are familiar with the Indonesian market and consumer preferences. However, they are likely not familiar with your product. Imported products have failed because distributors lacked knowledge and training on how to use and handle a product to maintain quality and brand image.
- Products must be priced competitively.
- Exporters should be prepared to deal with orders in small quantities and be flexible on required minimum quantities.
- Exporters should offer the market a range of products to give consumers a choice.
- Products that have at least a 9-month shelf life have fewer problems with customs officials. Expiration dates must be clearly marked.
- Exporters should find out as much as possible about the market and culture.
- Local agents should be sought and consulted. Before choosing a distributor, exporters should make sure that channels of distribution are closely supervised.
- Singapore is a showcase. However the trans-shipment is more difficult compare to prior

September 2008 due to the ML issue.

- Exporters should provide local agents the complete documentation required to register the product for a ML number.
- Exporters should actively contact retailers directly, not only through the importer or agent for information regarding a product's sales potential.
- The cost of registering and importing a product can be high for a distributor. The ML regulation provides that distributors will have sole distribution rights.

V. POST CONTACT AND FURTHER INFORMATION

The Foreign Agricultural Service (FAS), U.S. Embassy Jakarta maintains up-to-date information covering food and agricultural import opportunities in Indonesia and would be pleased to assist in facilitating U.S. exports and entry to the Indonesian market. Questions or comments regarding this report should be directed to FAS Jakarta at the following local or U.S. mailing address:

International Post: Foreign Agricultural Service
U.S. Embassy Jakarta
Jl. Medan Merdeka Selatan # 3-5
Jakarta 10110 - Indonesia
Tel: +62 21 3435-9161
Fax: +62 21 3435-9920
e-mail: agjakarta@fas.usda.gov

U.S. mail: Foreign Agricultural Service
U.S. Embassy-Jakarta
Box 1, Unit 8129
FPO AP 96520-0001

For more information on exporting U.S. agricultural products to Indonesia and other countries, please visit the Foreign Agricultural Service's Home Page: <http://www.fas.usda.gov>

VI. OTHER RELEVANT REPORT

Food and Agricultural Import Regulation and Standard Annual Report (ID9022):
http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Narrative_Jakarta_Indonesia_9-1-

2009.pdf

New Requirements for Selected Food & Beverages (ID9001):

<http://www.fas.usda.gov/gainfiles/200901/146327020.pdf>

Import Requirement and Procedures for Processed Food

ID9004): <http://www.fas.usda.gov/gainfiles/200903/146347608.pdf>

Newest List of Approved Halal Certification Bodies

(ID9028):http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Newest%20List%20of%20Approved%20Halal%20Certification%20Bodies_Jakarta_Indonesia_10-28-2009.pdf

Export Certificate FAIRS Annual Report

(ID9026):http://gain.fas.usda.gov/Recent%20GAIN%20Publications/Food%20and%20Agricultural%20Import%20Regulations%20and%20Standards%20-%20Certification_Jakarta_Indonesia_10-8-2009.pdf

Exporter Guide Annual

(ID9031):http://gain.fas.usda.gov/Recent%20GAIN%20Publications/EXPORTER%20GUIDE%20ANNUAL_Jakarta_Indonesia_11-24-2009.pdf

Exchange Rate (Rp./1US\$) on Period Month Ending Basis

Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
2005	9,149	9,235	9,518	9,682	9,467	9,649	9,826	10,097	10,250	10,020	10,067	9,850	9,734
2006	9,369	9,280	9,117	8,826	9,212	9,353	9,124	9,119	9,205	9,110	9,165	9,020	9,158
2007	9,090	9,160	9,118	9,083	8,828	9,054	9,186	9,410	9,137	9,379	9,376	9,419	9,187
2008	9,304	9,051	9,199	9,234	9,318	9,225	9,118	9,153	9,378	10,995	12,151	10,950	9,756
2009	11,330	11,975	11,575	10,713	10,340	10,225	9,920	10,060	9,681	9,545	9,480	9,400	10,354

Source: Central Bureau of Statistic (BPS-Badan Pusat Statistik) and Business Indonesia Daily Newspaper